



VUFIND: THE MNPALS EXPERIENCE

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Goals

- Learn about...
 - the basics of the open source VuFind project and the functionality of the search interface
 - the MnPALS Consortium's implementation of VuFind (MnPALS Plus)
- Discuss...
 - the challenges in adopting a new search paradigm

What's in it for you?

PALS librarians will...

- walk away with a greater understanding of MnPALS Plus
- feel more confident using Plus and understanding search results
- be better able to advocate for it within their own institutions

Everyone else will...

- learn about the possibilities and potential of VuFind
- see how favorably it compares to its expensive competitors
- be able to advocate for it within their own organizations

An outline



- Musings about OPACs
- An Introduction to VuFind
- MnPALS's Implementation: Plus
- A Quick Comparison of Tools
- The Road Ahead

Let's head back to 2006...

- Well-known blogger Karen Schneider publishes her manifesto, “How OPACs Suck”
- Google, Amazon, IMDB use relevance and return the “best” matches first
- When one compare these tools with library OPACs, it's obvious that they “suck”

So what should OPACs have?

- OPACs should have the following features:
 - Relevance ranking
 - Stemming
 - Field weighting
 - Spell checking
 - Refine original queries
 - In-line query limiters
 - Duplicate detection
 - Sort flexibility
- Support for popular search operators
- Quoted phrase searching, wildcards, and proximity searching
- Faceted searching
- Advanced search page
- Customizable search result pages
- “Best bets”
- Search logs
- Administrative interface

Karen's vision

- Standards-compliant Web services
- “Dis-integrated” from the ILS
- Use of global records, not local

The MnPALS OPAC sucks

- Meets only some of Karen's criteria
 - Relevance ranking (supposedly)
 - Refine original queries
 - In-line query delimiters (buried)
 - Sort flexibility (confusing)
 - Support for popular search operators (partially)
 - Quoted phrase searching, wildcards, and proximity searching
 - Search logs

Seven months later (January 2007)...

- MnPALS Consortium of Libraries' User Council establishes the Discovery Tool Task Force to:
 - “survey and assess available opportunities (and interests) in implementing discovery tools to enhance user's experience”

Consortium survey

- Consortium libraries were surveyed as to what “discovery tool” they wanted first
- Top three results:
 - Catalog enhancement
 - OpenURL resolver
 - Federated search

Twenty month later (August 2008)...

- MnPALS launches MnPALS Plus, an open source “discovery tool” based on VuFind.

What is VuFind?

- Open source resource discovery portal for libraries
- Purpose: To provide a single interface for all library resources
 - Homepage
 - Catalog
 - Articles
 - Digital libraries
 - Etc.
- Licensed under the GNU Public License (GPL)
- Released as an open source product on June 20, 2007

Who developed VuFind?

- The Falvey Memorial Library at Villanova University, Villanova, PA

What's in it for users?

- Faceted search results
- Live item status and location information
- Covers
- Text item information to phone
- Citation generator
- RSS syndication
- “Similar items” suggestions
- Save resources for later
- Author biographies (via Wikipedia)
- Persistent URLs

What's in it for librarians?

- Easy branding and other customization
- Search features
 - Stemming
 - Popular query operators
 - Phrase searching
 - Wildcards and proximity searching
- Search results
 - Facets
 - Flexible sorting
- Easy search box code for the library website
- No support fees!

What's in it for the techies?

- Integrates with major ILSs, including Aleph, Voyager, SirsiDynix, and Innovative
- Tweak-able relevancy algorithm and field weighting
- Performance and scalability: Uses the Apache SOLR search engine
- OAI syndication

Web 2.0 features

- Tagging
- RSS syndication
- Reviews (pulled from Amazon.com)
- User comments

Demo



➤ Let's see it already!

MnPALS Plus adoption

- Minnesota state universities
 - Metropolitan State University (beta, link to Classic)
 - Minnesota State University, Mankato (link to Plus)
 - Minnesota State University, Moorhead (link to Plus)
 - Southwest Minnesota State University (links to both)

MnPALS Plus adoption

- Minnesota consolidated, community and technical colleges:
 - Central Lakes College (switched)
 - Dakota County Technical College (switched, link to Classic)
 - Fond du Lac Tribal & Community College (links to both)
 - Hibbing Community College (switched)
 - Minnesota West Community and Technical College (links to both)
 - Minneapolis Community and Technical College (switched)
 - Riverland Community College (links to both)
 - South Central College (links to both)
 - Vermilion Community College (link to Plus)

MnPALS Plus adoption

- Minnesota private colleges and universities:
 - Bethany Lutheran College (switched)
 - College of St. Benedict/St. John's University (WorldCat Local, link to Plus and Classic)
 - Concordia College (switched, link to Classic)
 - Gustavus Adolphus College (link to Plus)
 - Minnesota School of Business/Globe University (switched)
 - St. Mary's University (switched, link to Classic)

The word has spread...

- On January 16, 2009, PALS announced it will provide a VuFind implementation for North Dakota's ODIN library consortium
- PALS office has also received inquiries from the South Dakota Library Network

Usability testing

- Usability testing
 - Concordia and Minnesota State Moorhead
 - Planned: Gustavus Adolphus, Minnesota State Mankato, St. Cloud State
 - Will be ongoing throughout the consortium

Usability testing

➤ Purpose

- To observe how well the MnPALS Plus interface responds to users conducting common tasks
- To identify possible improvements to the interface

➤ Methodology

- Only a small set of test users is necessary
- See “Why You Only Need to Test With 5 Users” at <http://www.useit.com/alertbox/20000319.html>

➤ Results

Challenges

- A new search paradigm
 - The faceted, “discovery portal” philosophy
 - Boolean (matching) versus Google (relevance)
 - Stemming

Relevancy algorithm

- Weighted toward titles
- Easy to change
- Example scoring and ranking
 - Exact title match: 1000
 - Title starts with match: 750
 - Title includes all words: 100
 - Exact author match: 700
 - Author includes all words: 100
 - Exact topic (subject) match: 750
 - Etc.

How does VuFind compare with Karen Schneider's list?

- It includes almost everything!
 - ✓ Relevance ranking
 - ✓ Stemming
 - ✓ Field weighting
 - x Spell checking (will be implemented)
 - ✓ Refine original queries
 - x In-line query limiters
 - ? Duplicate detection
 - ✓ Sort flexibility
- ✓ Support for popular search operators
- ✓ Quoted phrase searching, wildcards, and proximity searching
- ✓ Faceted searching
- ✓ Advanced search page
- ✓ Customizable search result pages
- x "Best bets"
- x Search logs (not yet)
- ? Administrative interface

VuFind, WorldCat Local, and Endeca

- VuFind (MnPALS implementation): August 2008
- VuFind (open source release): June 20, 2007
- WorldCat Local (pilot): April 2007
- Endeca (implementation at NCSU): January 12, 2006

How does VuFind compare with WorldCat Local and Endeca?

Criteria	VuFind (Plus implementation)	WorldCat Local	Endeca (NCSU implementation)
Search by call number	No	No	<u>Yes</u>
Spell check	In progress	<u>Yes</u>	<u>Yes</u>
Similar items	<u>Yes</u>	No	No
Citation generator	Needs work	<u>Yes</u>	No
Citation export	In progress	<u>Yes</u>	<u>Yes</u>
Search syndication (RSS)	<u>Yes</u>	No	<u>Yes</u>
Tweak-able relevancy algorithm	<u>Yes</u>	No	No
Tagging	<u>Yes</u>	<u>Yes</u>	No
Open source	<u>Yes</u>	No	No
Text to phone	<u>Yes</u>	No	No
Usage statistics	No	<u>Yes</u>	Presumably

Observations

- Several common characteristics
 - Integrate/interact with local ILS to varying degrees
 - Live item status
 - Faceted search
 - Browse by LOC class
 - Book covers
 - Reviews and/or user comments
- Mobile functionality
 - WorldCat announced mobile pilot (January 2009)
 - NCSU provides mobile view
 - Have not tested VuFind

VuFind: Strengths and weaknesses

- Weaknesses
 - Not “polished”
 - No usage statistics
- Strengths
 - Web 2.0
 - Flexibility and adaptability
 - Open source
 - Not proprietary

MnPALS Plus: The road ahead

- Statistics
 - “VuFind needs the ability to record statistics on various user actions to generate useful statistics reports.” (from the VuFind development page)
- ILLs do not display in account
 - Issue with Ex Libris
- Developing a RefWorks port
- Better FAQ and tutorials
- Assessment
 - Increased access?
 - High circulation rates?
 - Etc.

A big thank you!

- Al Rykhus
 - PALS information systems developer and integrator
 - Send technical questions to him! <alan.rykhus@mnsu.edu>
- Discovery Tool Task Force members
 - Alec Sonsteby (Chair) – Concordia College, Moorhead
 - Jennifer DeJonghe – Metropolitan State University
 - Travis Dolence – Minnesota State University, Moorhead
 - Adam Marsnik – Normandale Community College
 - Melissa Prescott – St. Cloud State University
 - Evan Rusch – Minnesota State University, Mankato
 - Perry Madden – PALS
- MnPALS Consortium of Libraries User Council
- The libraries testing and using MnPALS Plus
- Ginny Connell, M.S. LIS intern at Concordia College, fall 2008

To learn more...

- VuFind: <<http://www.VuFind.org>>
- MnPALS Plus FAQ:
<<http://www.mnpals.org/sections/mnpalsplus.html>>
- Try out Plus at <<http://plus.mnpals.net>>

Questions?



- Any questions?
- Send technical questions to Al Rykhus
<alan.rykhus@mnsu.edu>
- Send inquiries about the possibility of a PALS implementation of VuFind for your institution or consortium to Stephen Elfstrand, PALS executive director
<stephen.elfstrand@mnsu.edu>

Thank you



- Alec Sonsteby
 - Before May 9, contact at Alec at <sonsteby@cord.edu>
 - After May 9, contact Alec at Metropolitan State University